eMall TRAINING MANUAL

BASIC LEVEL

Ordering NON CATALOG items

www.eva.virginia.gov
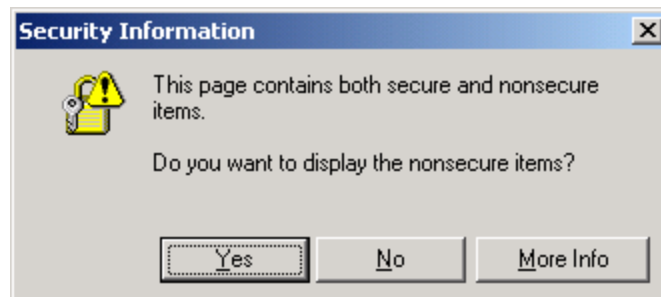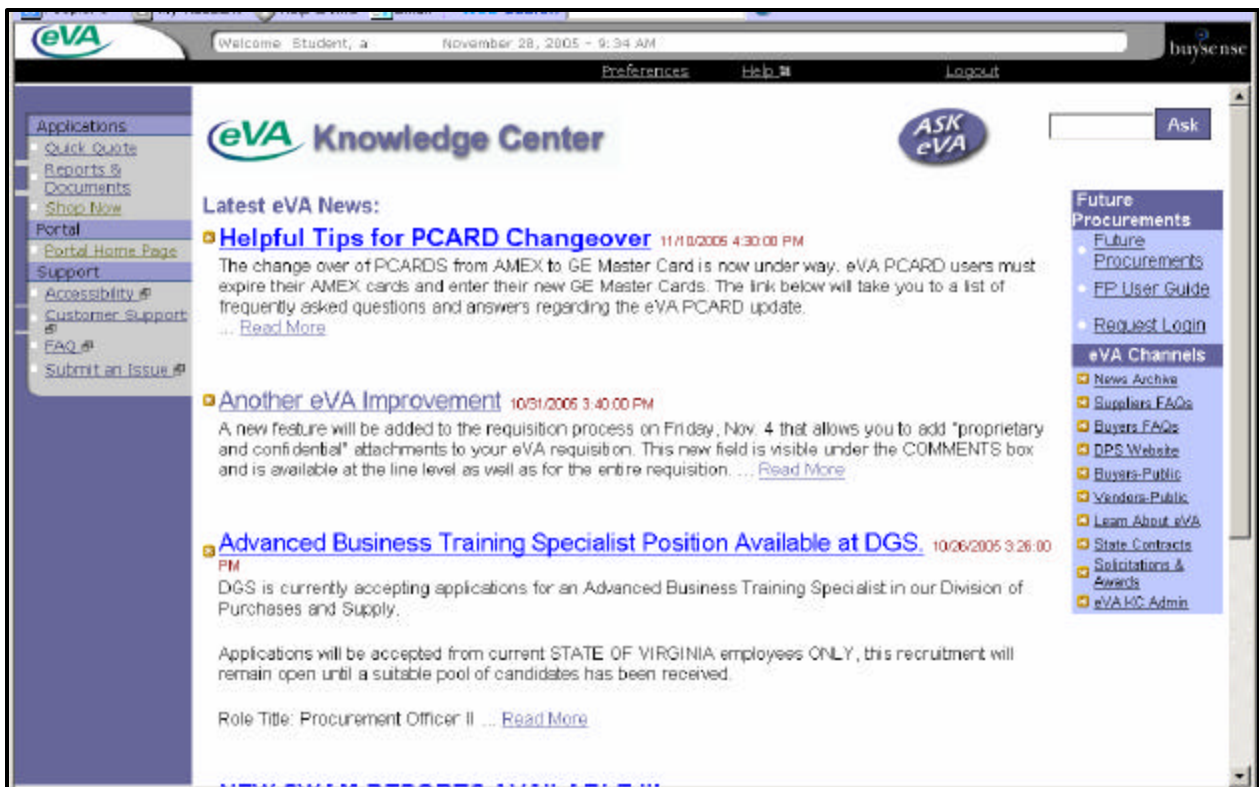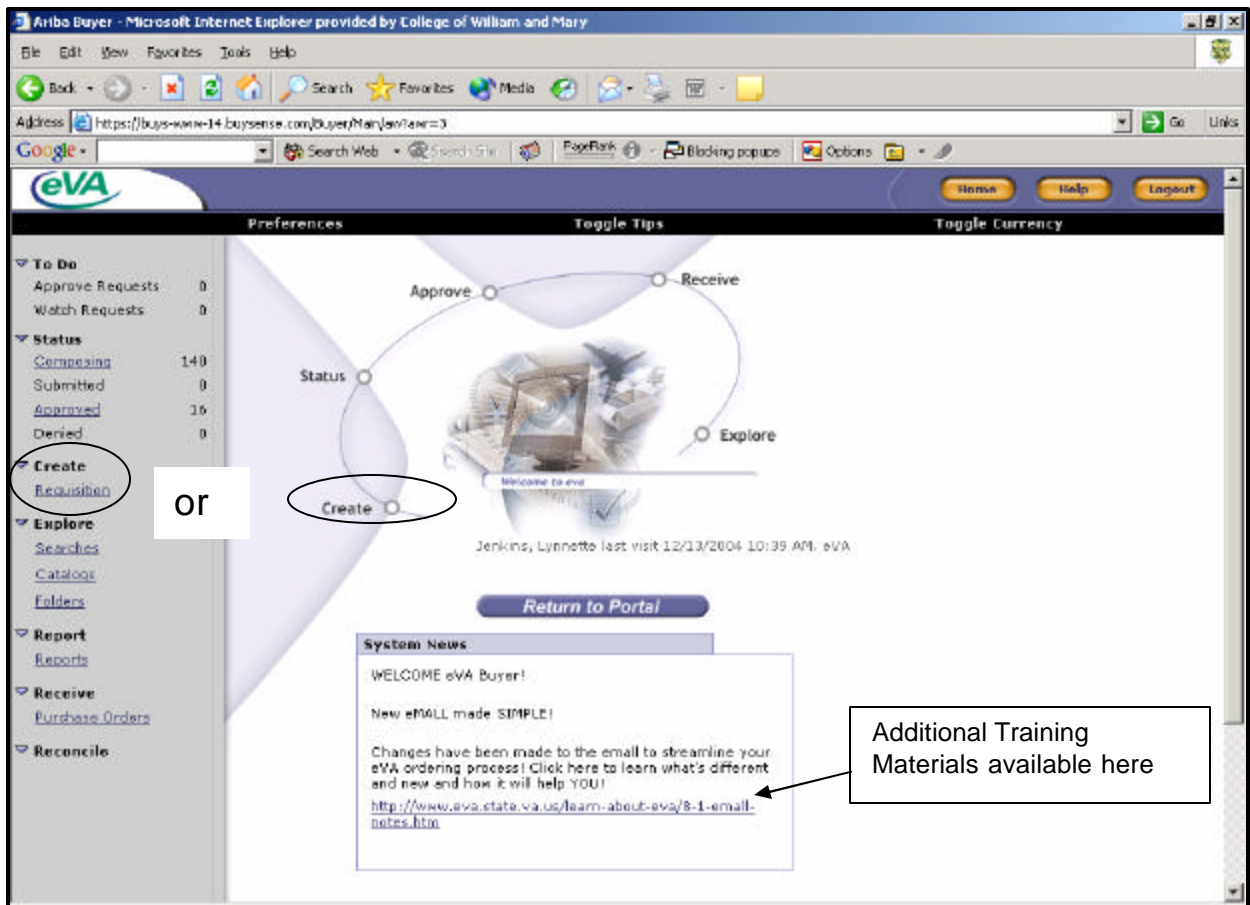

LOG IN

- ➤ Log in as a Buyer

- ➤ Username and password is case sensitive! Be sure to enter your username in all <u>lowercase</u> letters

- ➤ When the following dialog box appears, click YES to proceed:

Click on "Shop Now". Then click on "Requisition" *or* "Create".

CREATING A REQUISITION

ADD TITLE

- ➢ Title: Type an identifying title of your choice.

- ➢ On Behalf Of: Will default.

- ➢ Use PCard: If visible, uncheck box if you will not be using purchase card.

- ➢ PCard alias: Will default, if applicable.

  Remaining fields will default.

IMPORTANT: Change the PO CATEGORY to R02 when using a non-registered vendor or when the order is for a commodity type that appears on the eVA exclusion list.

Click "Next" button.

CREATING A REQUISITION (continued)

ADD ITEMS

The above screen appears, which is used for catalog ordering.
Refer to the eMall User Guide, Vol. 1 for catalog searching techniques.

➢   Click on the "Create Non-Catalog item" button

CREATING A REQUISITION (continued)

ADD NON CATALOG ITEM

➢ **Full Description:** Enter description of item being ordered using key words first.

➢ **Commodity Code:** The pull-down pick list (above) will store recently used codes. To search for other codes, click on "other" and the following screen appears:

➢ **Field: Name** Enter a commodity description OR an NIGP code.

➢ **Click "Search" button. When search results appear, Click "Select" button.** If not exact, search additional pages and/or use closest description.

CREATING A REQUISITION (continued)

Add Items" screen re-appears with selected commodity code name in the field.

> Supplier: The supplier (vendor) search is similar to the commodity code search.
> The pull-down pick list stores recently used suppliers.
> To search for other suppliers, click "other".

Searching for a Supplier

> Field: Company Enter the company legal name (will accept 'partial' name)
> Click "Search" button
> Search Results: Choose from names in retrieved search results.
> Click "Select" button

NOTE: Only eVA registered vendors can be retrieved with this search. Use of non-eVA registered vendors is discouraged. If you must use a non-registered vendor, see instructions in the <u>eMall User Guide, Vol. 1</u>.

CREATING A REQUISITION (continued)

The "Add Items" screen reappears with selected supplier name and contact data in the fields.

- ➤ Supplier Part Number: This field may be used for part number, stock number, catalog number.

- ➤ Contract Number: Enter the applicable contract number for the item, if applicable.

Scroll to the right side of the screen and add the following:

- ➤ Supplier Auxiliary Part ID: Rarely used – not a required field.

- ➤ Quantity: Enter the numeric quantity.

- ➤ Unit of Measure: The pull-down list will store recently used units.

    To search for other units, choose *other* in the drop down and search as illustrated earlier for the commodity/supplier fields.

- ➤ Price: Enter the **UNIT** price.   eVA does the math.

Click the "OK" button

CREATING A REQUISITION (continued)

SHOPPING CART

Here's your chance to see what's in your "shopping cart".

If you are ordering more items from the same vendor,
 ➢ Enter a checkmark in box next to item number.
 ➢ Click the COPY button.
 ➢ Enter a checkmark in the box next to the NEW item that appears.
 ➢ Click the EDIT button.
 ➢ Change the necessary fields for the newly copied item:
       description/price/quantity/contract number, etc.
 ➢ Click the **OK** button

If you are NOT ordering more items and do not need to edit/add accounting codes, click the **Checkout** button. (Go to page 11)

If you click the **Next** button on the previous screen, you will see the Accounting Line Details screen. Make any necessary changes to your accounting information.

NOTE: If you need to make the SAME changes to MULTIPLE line items, it's recommended that you do a MASS edit from the Checkout screen. (next page)

Click the EDIT button and make changes when fields open up:

Click the **OK** button when all fields have been changed**.**

CHECKOUT

FOR MULTIPLE LINE ITEM CHANGES:

If all items need to be changed for things such as accounting codes, check the checkbox above ALL the checkboxes next to items.

If only a few items need to be changed, click the checkbox next to the applicable line item.

Click the **Edit** button below all line items.

On the next screen, enter the changes and click the **Next** button. You will then be shown a new screen with your changes. Click the Done button to proceed to the Checkout screen.

SHIPPING   (Checkout Screen)

Shipping information will default to your assigned shipping address. If necessary to change, click the down arrow in the Ship To field and select other. Conduct a search for the applicable shipping address.

Note: Only addresses loaded by the eVA administrator can be seen in eVA.

> ➢ Deliver to: Will default. Can be changed by deleting default and entering new text.
> ➢ Need-by Date: Click on calendar. Click on date.

COMMENTS


> ➢ Comments: May be added for either the entire requisition or by the line item.
> 255 character spaces are available for comments.
> ➢ Attachments: May be added in the same browsing manner as with e-mail.

IMPORTANT! It's imperative that the "include comment/attachments on purchase orders" checkbox be selected if you desire the vendor see the comments and/or attachments.

APPROVAL FLOW

When you click on the Approval Flow Tab on the Checkout screen, your approval workflow appears so you can see who must approve your requisition. If you click on the approver's box, you will see more detail.
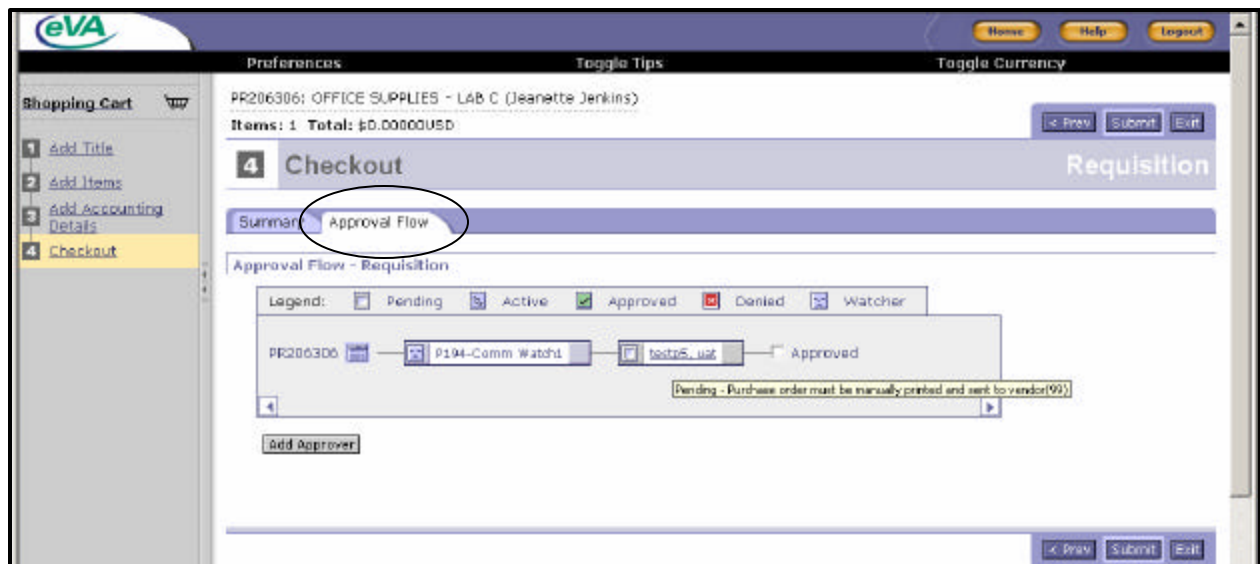
If the vendor cannot accept the order electronically, you will be inserted into the workflow as the LAST approver. This is your cue that the order(s) must be printed and faxed or mailed to the vendor.

ALL DONE?

➢ Review your requisition and edit, if needed, prior to submitting.

➢ When satisfied, after review and edits, click "Submit".